

## Receiving 211 Back@Home Referrals

1. This smartsheet collects all the information from 211 on each referral:

<https://app.smartsheet.com/sheets/cQ3H8hGffG26RjF8Jm6pFxV9G5FVg6g8CF7gWRQ1>

Only contact referrals in the Open section of the smartsheet:

	First Name	Last Name	Assigned Rehousing Agency	What county are you currently living in?	Date referred	Attempted to contact	Result of Contact
1	Open						

2. Before you attempt to contact the person, take the following steps:

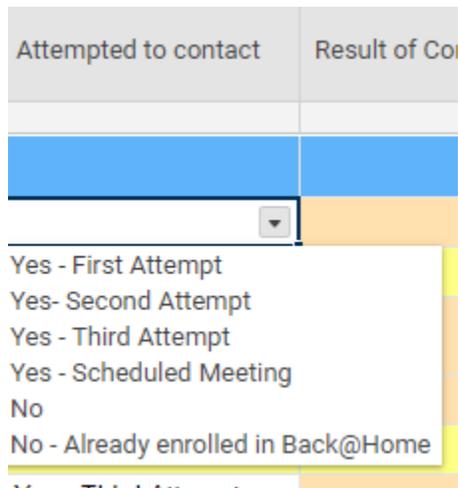
A. make sure they aren't already enrolled in Back@Home.

If they are already on the by-name list and your agency is working with them, mark "Attempted to Contact" column as "No – Already enrolled in Back@Home". Then mark the "result of contact" column as "Already enrolled in Back@Home".

If they are already on the by-name list but your agency has not started or lost contact with them, then follow the next steps to contact them.

B. Do a double check that the household is eligible, and read the notes at the end of the row for more information about their situation. Refer to the end of this document for a full explanation of each column in the spreadsheet.

C. Check to see if the person needs Spanish translation or assistive listening devices. If they do, do not call them until you have a resource in place to help communicate with the client.



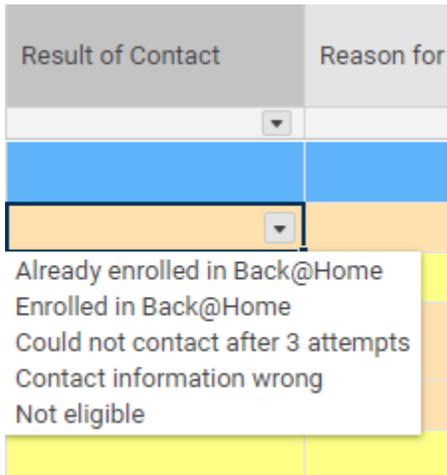
3. When you attempt to contact the person, change the "Attempted to Contact" column to "Yes – First Attempt".

4a. If the first attempt to contact is unsuccessful, try again and change the column to “Yes – Second Attempt.”

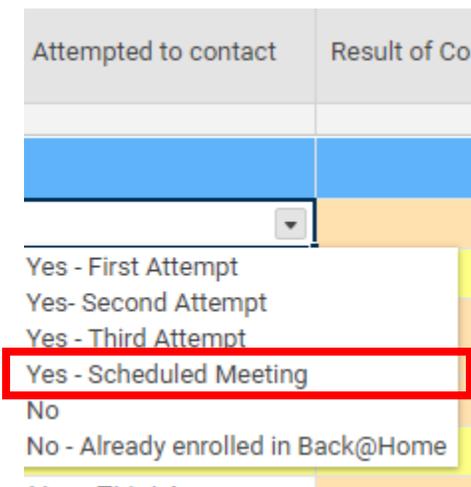
4b. If the second attempt is unsuccessful, try again and change the column to “Yes – Third Attempt”.

4c. If three attempts to contact were unsuccessful, change the “Result of contact” column to “Could Not Contact after 3 attempts”. Do NOT change this column to “Could Not Contact” until three attempts to contact have been made.

4d. If their phone number is disconnected or wrong after any attempts, and there is no other way to contact the family, mark the “Result of Contact” column “Contact information wrong”



5. If any of the attempts to contact ARE successful, verify the basic information collected by 211 is correct, then schedule a meeting to enroll them in Back@Home. Mark the “Attempted to Contact” column “Yes – Scheduled Meeting”.



6. Once you have met the household and verified their eligibility, mark the “Result of Contact” column with “Enrolled in Back@Home”.

Result of Contact	Reason for
<input type="text"/>	

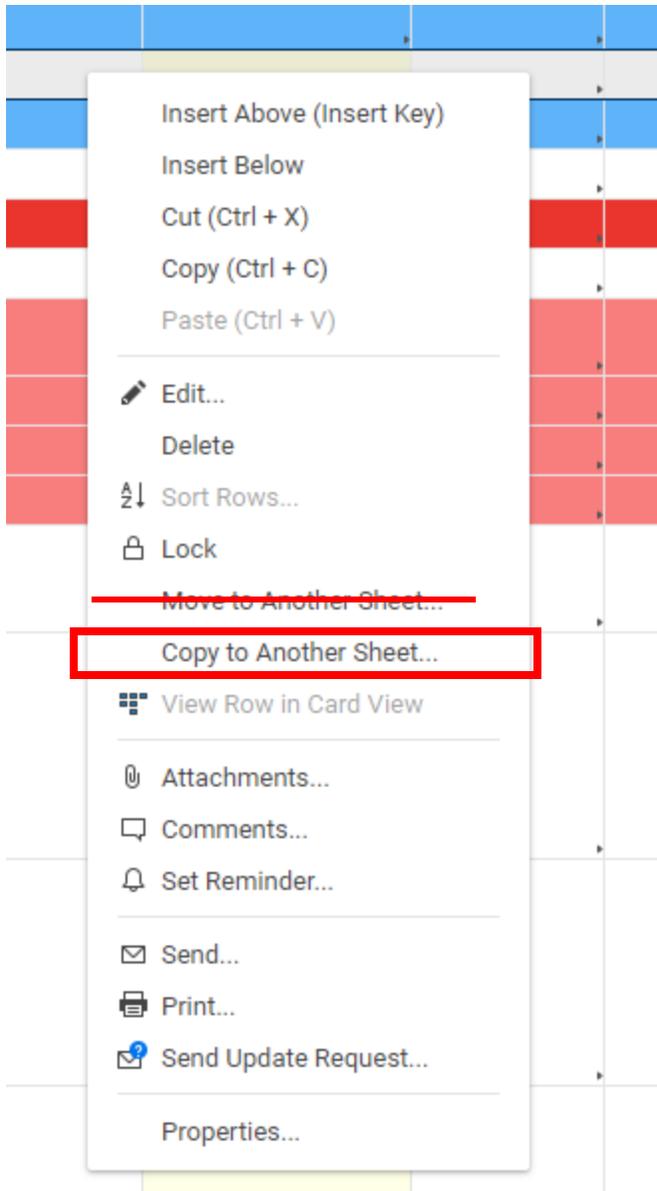
- Already enrolled in Back@Home
- Enrolled in Back@Home
- Could not contact after 3 attempts
- Contact information wrong
- Not eligible

7. If a household is not eligible for Back@Home after you speak with them, mark the “Result of Contact” column “Not Eligible” and enter the reason they are not eligible for Back@Home on the “Reason for Denial” column.

Reason for denial	Date of assessment
<input type="text"/>	<input type="text"/>

- Did not live in disaster-affected county
- Not displaced by Hurricane Florence
- Not homeless or precariously housed
- Homeowner planning to return to home
- Over income
- Has another housing option
- Moved out of state

8. Once enrolled in Back@Home, right click the row and COPY the row to the By-Name List. Do NOT move the row, or it will be deleted from the 211 sheet.



When prompted copy the row to **“Current Back@Home By-Name List”**. DO NOT choose any other sheet.

7. After the Result of Contact column is completed, the referral manager will move the referral to the “closed” section of the sheet. The Closed section will be hidden but can be expanded if you need to go back and look at a referral that was previously closed:



Clicking the plus next to Closed will reveal all closed cases:

- Closed							
Joe	Dimaggio	Craven	Trillium	11/25/2018	Yes - Third Attempt	Added to By-Name List	F

### Priorities and color coding

The following chart indicates Back@Home priorities for assistance. Households directly displaced by Hurricane Florence are the first priority. Among those displaced by Florence, people living unsheltered should be served first. Youth 18-24 living unsheltered should be top priority.

BACK@HOME PRIORITIZATION		
PRIORITIZATION	HOUSING STATUS AT APPLICATION	SUBPOPULATION CONSIDERATIONS
RESIDENTS DISPLACED BY HURRICANE FLORENCE (due to capacity, Back@Home is currently only serving directly displaced residents)	UNSHELTERED	UNACCOMPANIED YOUTH
		FAMILIES WITH MINOR CHILDREN
		ADULTS
	SHELTERED	UNACCOMPANIED YOUTH
		FAMILIES WITH MINOR CHILDREN
		ADULTS
RESIDENTS INDIRECTLY IMPACTED BY HURRICANE FLORENCE	UNSHELTERED	UNACCOMPANIED YOUTH
		FAMILIES WITH MINOR CHILDREN
		ADULTS
	SHELTERED	UNACCOMPANIED YOUTH
		FAMILIES WITH MINOR CHILDREN

## ADULTS

Some of these priorities are reflected in color coding on the 211 Back@Home Eligibility Screen smartsheet. Unsheltered households are highlighted in yellow. The age of head of household column is highlighted in blue for anyone under 24, and the number of children in a household is highlighted blue if the family is unsheltered. Right now 211 is screening out households who were not directly displaced by Hurricane Florence to focus limited capacity on first priority households. In the future Back@Home may serve households who were not directly displaced by Hurricane Florence, if funding is available.

### Filters

There are filters for you to use to help you find your cases on the sheet. To find the filters, click on the filters menu in the upper left hand corner of the screen:

The screenshot shows a Smartsheet interface with a filter menu open. The menu is titled "Filter Off" and lists various filter options, each with a person icon. The options are: First Fruit All Referrals, First Fruit Closed Referrals, First Fruit Open Referrals, SFVC All Referrals, SFVC Closed Referrals, SFVC Open Referrals, Trillium All Referrals, Trillium Closed Referrals, Trillium Open Referrals, VOA All Referrals, VOA Closed Referrals, and VOA Open Referrals. At the bottom of the menu is a "New Filter..." option. The background spreadsheet shows a table with columns for "First Name", "What county are you currently living in?", "Date referred", and "Attempted to contact". The rows are color-coded: yellow for unsheltered households, blue for age under 24, and red for households not directly displaced by Hurricane Florence. The "Onslow" county is highlighted in yellow.

Each agency has three available filters:

All Referrals

Closed Referrals

Open Referrals

Public filters (permanent, everyone can see them) have person icons next to them. When using these filters, do not add more filter conditions. You will change that filter for everyone. If you want to make a filter that is not already on the list, click on "New Filter" to make your own.